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ABSTRACT

This guidebook provides practical information for developing educational partnerships, which is based on the experiences of 30 different partnerships in the Office of Educational Research and Improvement's (OERI) Educational Partnership Program. Conclusions about the process of developing a partnership are offered. First, partnerships should be developed if there is a shared concern about a real problem that can be best addressed by organizations from different sectors working together. Second, beginning a successful partnership requires communication among participants about the nature of the concerns, the feasibility of a partnership to address those concerns, organization, roles and responsibilities, and the content and focus of activities. Third, successful partnerships require leadership to build commitment and gather resources, use evaluation and strategic and adaptive planning, and acknowledge and confront problems. Finally, there is no single way to ensure successful partnership development. However, successful partnerships exhibit open information sharing at every point. Specific sections address the following questions: What are the steps to developing a successful educational partnership? How does a successful partnership begin? How do successful partnerships begin implementation? What is the role of evaluation and planning?; what happens when things go wrong? and Will the effort be worthwhile? The appendix contains the Educational Partnerships program directory. (LMI)

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ED 362 992

A Guide to Developing Educational Partnerships

U.S. Department of Education
Office of Educational Research
and Improvement (OERI)

EA 025363

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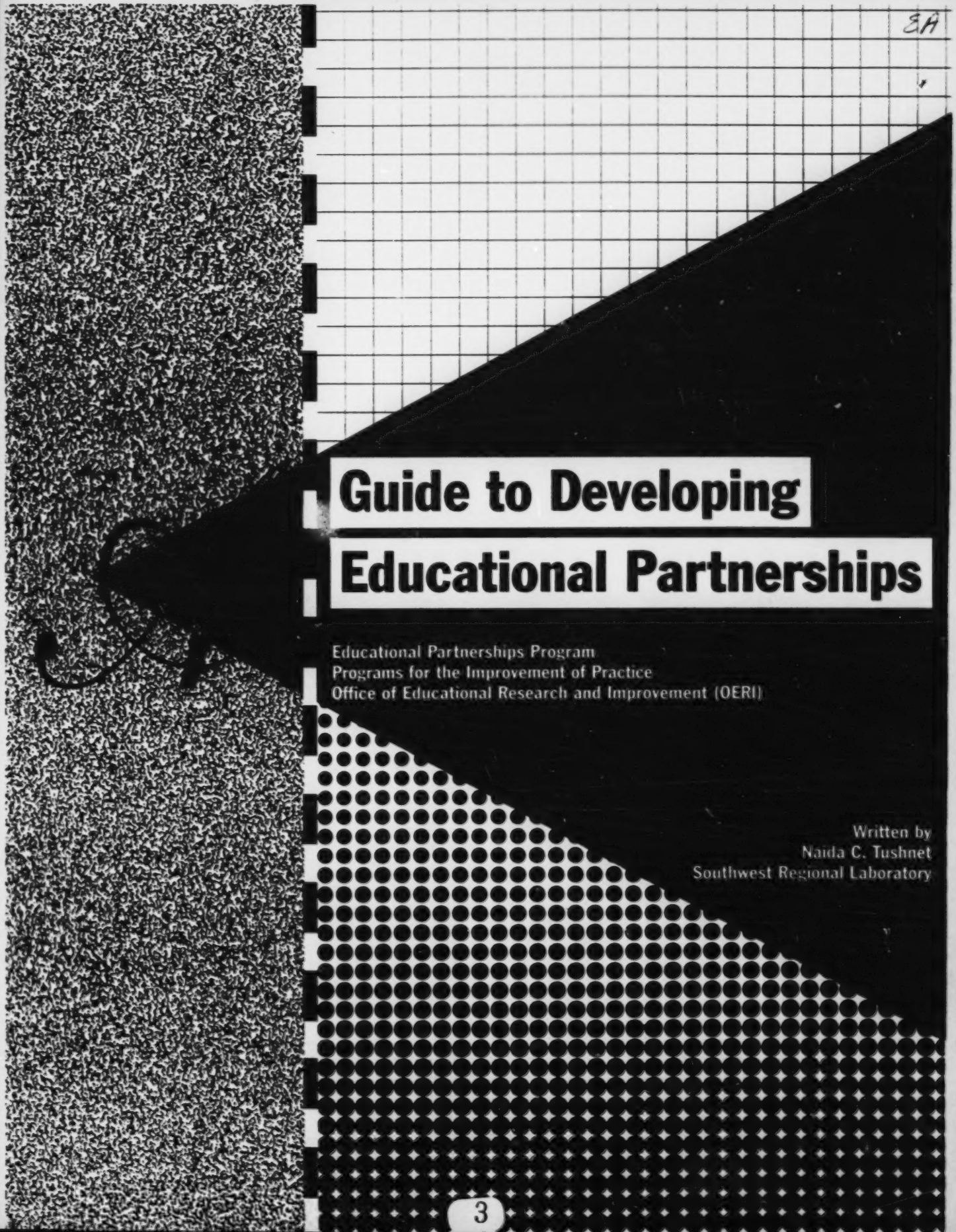

Guide to Developing Educational Partnerships

Educational Partnerships Program
Programs for the Improvement of Practice
Office of Educational Research and Improvement (OERI)

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October 1993

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FOREWORD

The effort to create educational opportunities for all our students and to prepare them for the challenges that await them in the coming century requires the best from all of us. One way schools, businesses, universities, and social and cultural organizations are working to meet this challenge is by creating partnerships among themselves. When I was governor of South Carolina, we employed a statewide partnership to reform the hundreds of schools in the state. Positive and quick results emerged. As Secretary of Education, I visit communities, schools, colleges, and businesses throughout America. Those attacking the problems together--in a collaborative approach--tend to be more successful. We believe this *Guide to Developing Educational Partnerships* will be of considerable assistance to local communities seeking to create their educational partnerships.

The guidebook provides practical information that is drawn from the experience of 30 different partnerships. Some focused on the transition students must make from school to work. Others concentrated on improving schools' curriculum and instruction. Still others built on local systemic reform initiatives. Because their objectives varied, so did their choice of partners. Overall, they included both large and small businesses, museums and other cultural organizations, social service agencies, and institutions of higher education. Each partnership experienced the pleasures and pains of developing new relationships. And some clearly accomplished more than others. Together, they constitute a valuable set of experiences that can enrich the work of others.

What makes this handbook particularly useful is the fact that it builds on research and evaluation data. That is, when the guidebook says an approach works, the reader can be confident that the assertion is backed by research evidence.

The *Guide to Developing Educational Partnerships* is being made available to help communities throughout the United States bring together different types of organizations to ensure that children and youth are well-prepared for the exciting future awaiting them.

Richard W. Riley
U.S. Secretary of Education

PREFACE

In less than a decade, educational partnerships to improve elementary and secondary education have become fixtures in thousands of school districts. Educational partnerships connect schools to community and social service agencies, cultural institutions, businesses, industry, and institutions of higher education to pursue joint activities.

For the most part, individuals in schools, businesses, or other agencies begin to develop partnerships through trial and error. As a result, although many efforts have been productive, others have led to frustration. Enough is now known about what makes partnerships get off to a good start. This information will help anyone who wishes to start a partnership and avoid as many frustrations as possible.

In 1989, the Office of Educational Research and Improvement (OERI) of the U.S. Department of Education joined efforts to encourage educational partnerships. OERI provided funding for partnerships with public elementary and secondary schools that have a variety of educational improvement goals. OERI also funded the Southwest Regional Laboratory (SWRL) and the Institute for Educational Leadership (IEL) to document and evaluate the funded partnerships. Our goal is to determine the impacts of the funded partnerships, both on educational organizations and the community, and to find the processes and structures associated with positive impacts. After studying the Educational Partnerships Program, we have some insights into actions that can give partnership developers a good start in their work.

The educational partnerships we studied included some sponsored by school districts, some by institutions of higher education, some by not-for-profit agencies, and some by business-dominated consortia. They addressed a variety of concerns, including curriculum reform, school-to-work transition, coordinated social services, and systemic change. In short, the OERI-funded educational partnerships are much like other partnerships that exist throughout the nation.

We have come to a major conclusion: *There is no single way to ensure successful partnership development.* However, at every point, successful partnerships exhibit open information sharing—they discuss where they are and where they want to go. These discussions help clarify and sometimes change roles and activities.

This guide is for partnership developers, particularly those who won't receive federal funds. It gives advice to potential partners, whether they come from schools or other organizations. Following our data collection and analysis, the research team met to consider the implications of our findings for others who wish to develop partnerships. The result is rooted in the evaluation and is organized around major issues confronting partnership developers. Our advice is accompanied by examples from the partnerships funded by OERI. A directory of the partnership projects is included in the guide.

ACKNOWLEDGMENTS

This guide grew out of the Documentation and Evaluation of the Educational Partnerships Program. It is informed by the work of the documentation and evaluation team, Cristina Bodinger-deUriarte and David van Broekhuizen of the Southwest Regional Laboratory and Jacqueline P. Danzberger and Michele Clark of the Institute for Educational Leadership. The guide has benefited greatly from reviews and comments made by members of the Educational Partnerships Program Study Group. Additional support and reviews were provided by colleagues in OERI.

The partnerships that were funded through the Educational Partnerships Program were the source of information for the guide. The efforts of project staff members, individuals in partner organizations, and teachers and administrators in participating school districts are reflected in the guide. The willingness of already busy people to reflect on their experiences is appreciated.

I want particularly to acknowledge the valuable insights, critiques, and assistance provided by Susan Gruskin, program manager for the Educational Partnerships Program, and David Mack, assistant director for the Educational Networks Division in OERI. Thanks also go to Ellen Reines designing the cover.

EXECUTIVE SUMMARY

Educational partnerships connect schools to community and social service agencies, cultural institutions, businesses, industry, and institutions of higher education to pursue joint activities that benefit schools and communities. For the most part, individuals in schools, businesses, or other agencies begin to develop partnerships through trial and error. As a result, although many efforts have been productive, others have led to frustration. Enough is now known about what makes partnerships get off to a good start. The information in this guide will help anyone who wishes to start a partnership avoid as many frustrations as possible.

- **Partnerships should be developed if there is a shared concern about a real problem that can best be addressed by organizations from different sectors working together.**

- **Beginning a successful partnership requires communication among potential participants about**

    - the nature of the concerns that led to the idea of developing a partnership;
    - whether a partnership is a good way to address those concerns;
    - the organization of the partnership;
    - the specific roles and responsibilities of partners; and
    - the content and focus of partnership activities.

  Once a partnership is formed, others are told about the plans.

- **In successful partnerships, leadership builds commitment and gathers resources. The resources are used to help participants become comfortable with and adept at new ways of performing.**

- **Successful educational partnerships use evaluation and strategic and adaptive planning to ensure that activities meet local needs and conditions.**

- **Successful partnerships acknowledge and confront problems, using them as the opportunity to build relationships among partners.**

Partnerships can enhance educational opportunities for students and provide teachers and business representatives with the chance to grow. The challenges are stimulating and the outcomes rewarding.

SECTION I

WHAT ARE THE STEPS TO DEVELOPING A SUCCESSFUL EDUCATIONAL PARTNERSHIP?

Developing a successful educational partnership is not easy. Part of the difficulty is that there is no single way or checklist to follow. And this guide does not conclude with a formula. However, certain *principles* emerged from our study of OERI partnerships that should be applied by those who wish to use partnerships as vehicles for educational improvement.

1. **Successful educational partnerships address real problems.** Potential partners should share their perceptions of the problems faced in the community and in the schools. Formal needs assessment help focus activities, but it is equally important that participants identify *shared* concerns to which they can commit themselves and their organizations. Not all problems are best addressed through partnerships so the discussions of problems should include conversations about whether developing a partnership is an appropriate response.

2. **Successful educational partnerships can take many forms.** Partnerships can operate with a dominant partner, as a coalition, or as a collaborative. It is not so much the organization of the partnership but whether it is appropriate for the problems being addressed and the community in which the partnership is situated.

3. **Successful educational partnerships build on conversations with all players that include discussion about the content of activities.** Prior to forming a partnership, all organizations, including the unit, such as a school, to be affected, must engage in discussion about the partnership. The conversations provide necessary information about limits and possibilities and build commitment. Although it is possible to gain commitment after the partnership is formed, implementation is smoother if key parties are on board as work begins. The more the partnership requires individuals to change what they are doing and how they relate to one another, the more important it is for them to be involved in early conversations. Some partnerships simply reorganize existing activities or bring existing multiple partnerships under an umbrella. Prepartnership conversations, while necessary, can be less detailed in those circumstances.

4. **Successful educational partnerships communicate with all participants and the community after they have been organized.** Early partnership communications should focus on the reason for the partnership, including the problems it is designed to address. Communication of the content and the roles of participants also is important. These communications should respect the existing knowledge and skill of participants. Those who will receive services from the partnership should be informed of service availability, and those who are expected to change practice should be told of the time commitments required and the supports they will receive.

Developing a successful educational partnership is not easy. Part of the difficulty is that there is no single way or checklist to follow. And this guide does not conclude with a formula. However, certain *principles* emerged from our study of OERI partnerships that should be applied by those who wish to use partnerships as vehicles for educational improvement.

5. **Leadership in successful educational partnerships helps build commitment and supports activities.** Leadership can be distributed among participating organizations or one individual can serve as a leader of the partnership. Individual leadership can be facilitative or visionary. The leadership function must fit the nature of the partners. If, for example, all participating organizations have strong leaders, facilitative or distributive leadership is likely to be the route to success.

6. **Successful educational partnerships provide resources, particularly technical assistance, to those who are expected to change behavior, roles, and/or relationships.** Necessary resources include training opportunities, matching talent to activities, and providing technical support. The greater the change required at the activity level, the greater the need for technical assistance and the less likely that training and identifying appropriate personnel will suffice. When partnerships aim for changes in policy development, assistance from facilitators helps policymakers implement new ways of developing and implementing policy.

7. **Successful educational partnerships engage in evaluation and adaptive planning.** In addition to identifying needs for particular activities, successful partnerships analyze community demographics and economic conditions. They also gather information about past innovations and how people feel about previous efforts as well as constraints that may limit the operations in one or more organizations. The need for such information is one reason all players should be involved in early discussions. Gathering information also models the kind of open exchange necessary for successful operation. Equally important, successful educational partnerships engage in evaluation so changes can be made in response to problems and concerns; thus everyone can learn whether the partnership is having an impact.

8. **Successful educational partnerships acknowledge and confront problems.** Problems are used as an opportunity to examine processes and structures. Decisionmaking procedures are designed to advance the partnership as well as solve the immediate problem. Efficiency in dealing with concerns is less important than ensuring continuing partnership cohesion. Partners take into account the feelings and interests of one another when making decisions within their own organizations.

SECTION II

HOW DOES A SUCCESSFUL PARTNERSHIP BEGIN?

Beginning a successful partnership requires communication among potential participants about

- **the nature of the concerns that led to the idea of developing a partnership;**
- **whether a partnership is a good way to address those concerns;**
- **the organization of the partnership;**
- **the specific roles and responsibilities of partners; and**
- **the content and focus of partnership activities.**

Once a partnership is formed, others are told about its plans.

In a community, almost anyone can propose to develop a partnership to improve schools. Before groups or individuals plunge in organizing a partnership, talk with others and make some decisions.

First, decide whether those involved want to commit time, energy, money, or other resources to a partnership. Some educational problems are probably better addressed without a partnership. However, some problems can only be addressed by an interorganizational arrangement such as a partnership. A common example is concern that noncollege-bound students have little understanding of workplace requirements. If such a concern exists, students can benefit from connections between schools and workplaces.

In deciding whether a partnership is appropriate, potential partners should define the problem they are addressing. Once the problem is defined and the decision made that a partnership is appropriate, there needs to be a strategy for partnership development. An early step is to discuss the goal of the partnership, its organization, and the activities participants will carry out.

Finally, once agreements are made, the existence of the partnership must be communicated to others, including those who will receive services, personnel in participating agencies, and the public at large.

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- **the organization of the partnership;**
- **the specific roles and responsibilities of partners; and**
- **the content and focus of partnership activities.**

Should We Develop a Partnership?

A partnership should be developed if there is shared concern about a real problem that can best be addressed by organizations from different sectors working together.

The most basic decision in starting a partnership is whether a partnership is the appropriate mechanism for solving identified problems and achieving identified goals. The decisionmaking process requires conversations among all potential partners.

At the start, the people or groups initiating the partnership need to talk to potential partners about what they see as the problem. The individuals included depend largely on the problem facing the community. The purpose of these conversations is to find out if others share the concern. Many partnerships, for example, are formed because businesses are unhappy with the quality of their entry-level employees. A business person might begin by talking to the superintendent about how to improve the skills of high school graduates. Or, a school superintendent may seek the support of local

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businesses to provide tutors or role models to urban students who don't know people with professional or technical jobs. Or, a community or government leader may believe that the schools need major and deep reform, which they will be unable to accomplish without outside collaboration. Approach others in the community and leadership in the school to seek agreement about the need for reform.

Should a meeting be called so all potential partners come together to decide whether to start a partnership, or should the initiator visit each partner individually? At this early stage, it really doesn't matter. Successful partnerships can begin with a series of one-on-one conversations among potential partners or a meeting of all can be held. During this exploratory phase, the goal is to get general agreement about working together. Later, when people have agreed to work together, they can all decide whether to hold meetings of the full group or use some other way of communicating.

At the outset, participants need to agree that a problem exists and that a partnership is a good way of dealing with it.

At the outset, participants need to agree that a problem exists and that a partnership is a good way of dealing with it. Some communities avoid recognizing problems. A successful partnership is difficult to launch in such a community. Does that mean the community can *never* solve its problems? No. It means that a partnership is *not* the way to go. Individuals and organizations can act on the problem through other means while taking steps to build shared recognition of needs that should be addressed. One way of doing this is to gather data about the problem.

One partnership shows how this can work. In it, members of the Chamber of Commerce complained among themselves about the preparation of students for work. They noted that the community had virtually full employment, but that growth had almost stopped. As a result of the comfortable employment figures, few in the community were concerned about student preparation for work, particularly because there was a high rate of enrollment in postsecondary institutions. The chamber decided to seek data about noncollege-bound students and the views of the business community. To gain commitment from the local community college and public school district, chamber members involved them in the design and analysis process. The study revealed shared concern about opportunities for students who were not preparing for college as well as the skills of the work force. Therefore, a partnership was developed to address those problems.

Why is shared identification of problems so important? Simply because developing a partnership requires a substantial commitment of time and energy. Partnerships are complex innovations. At the very least, they involve proposed changes in organizational arrangements and in programs. Neither type of change is easy to make. Both come with obstacles and problems. Consequently, if people are going to put in the effort to solve the problems and surmount the obstacles, they must all be sure it is worthwhile.

Frequently, partnerships and activities are begun because someone wants to demonstrate that the business or school system is aware of and participating in activities reflecting current trends. When people start a partnership to get good publicity, it usually doesn't work. At the onset, there may be much attention from the

press, but in the long run, it's virtually impossible to get people to implement new activities when they see the effort as a show effort. In contrast, when they think there is a reason for the required effort, they'll do what is needed.

Does one opportunistic partner doom the effort? Probably not, if the other participating partners are strong and have a solid commitment. We found, for example, at least two projects with a technology focus that were successful. In both, the technological organization entered the partnership with the not-quite-hidden agenda of increasing the market for their products. In both instances, the other partners focused on changing curriculum and instruction so students were in charge of their own learning rather than experiencing teacher-centered classrooms. Because the greatest changes in behavior and problems arose in addressing the *real* problem, the opportunistic motive of the businesses did not hinder implementation in these cases.

Despite the importance of shared understanding and agreement about a problem, we understand that most endeavors have some opportunism in them. However, be sure that the *opportunism does not affect the core substance of the project.* Further, it is possible to dilute the influence of an opportunistic partner by the partnership structure chosen. The selection of structure should reflect what has come out of the conversations about whether the community will support a partnership.

How Should Partnerships Be Organized?

No single organization fits all circumstances.

Partnerships, contrary to popular myth, don't necessarily have similar organizations or require absolute collaboration and levels of equality among partners. In fact, partnerships can be organized in various ways, and collaboration can range from working together on specific activities to shared decisionmaking about all activities. The appropriate organization is related to the goals of the partnership, the reasons people get involved, and the commitments they are willing to make.

Early efforts to find out whether others in the community share an interest in developing a partnership should provide information that helps with decisions about organization. The conversations reveal whether potential partners share a sense of the problem and whether they are willing to commit time and other resources to solving it. The conversations also reveal the limits they wish to place on their participation or the importance of the problem to their own organizational goals. As a result, the group can select an organization that is most likely to be successful.

It may be, as in one partnership, that health service providers in the community agreed that poor health among students constituted a major barrier to achievement in school. At the same time, however, the providers believed that they could only participate in a school-based clinic and in reviewing a health curriculum. In contrast, another community with a similar problem had health care providers who wished to be involved in collaborative efforts that included school-based clinics, health education, and work-place experiences for students. The different partnership organizations that resulted were both successful.

Partnerships, contrary to popular myth, don't necessarily have similar organizations or require absolute collaboration and levels of equality among partners. In fact, partnerships can be organized in various ways, and collaboration can range from working together on specific activities to shared decisionmaking about all activities. The appropriate organization is related to the goals of the partnership, the reasons people get involved, and the commitments they are willing to make.

Three types of partnership organizational structures are: (a) primary partner/limited partnerships, (b) coalition partnerships, and (c) collaborative partnerships.

Primary Partner/Limited Partnerships

The primary partner/limited partnership structure involves a managing partner with other organizations providing services either to it or to clients. The limited partners are conceptually similar to consultants. As partners, they don't receive pay; rather, the public relations and psychological rewards that come from being part of a community endeavor are their remuneration.

An example of a primary/limited partnership is one that provides volunteer tutors trained in a particular instructional approach. The primary partner provides support for volunteers, coordination within participating schools, and ongoing staff development for teachers and volunteers. One supporting partner helps identify schools and negotiate entry into them; the other provides the content expertise through specific training events and assistance in developing a manual.

When is this type of partnership appropriate? When one partner is joining for opportunistic motives. The limited role of one partner also will limit the negative effects of opportunism and, at the same time, take advantage of what the organization has to offer. The primary/limited structure also is appropriate when other partners, willing to contribute to the partnership, place clear boundaries around their participation. This type of partnership may work when, for legal or local political reasons, it is important for one partner to have strong control of the venture.

The primary partner/limited partnership can provide services, training, and materials, which, in turn, can influence schooling practices. To the extent that participating nonschool organizations are influenced by their participation, primary/limited partnerships also may increase support for education in the community. Indeed, in the example cited above, volunteers report more positive feelings about the schools and greater support for education. Finally, this type of partnership allows a visionary partner to set the agenda for those who are more pedestrian in their approach. Over time, through leadership, the visionary may get others to share the vision, but this form allows work to begin immediately and provides an arena for building the base. However, it may be limited in its ability to address new issues or problems different from those around which it was formed.

Coalition Partnerships

Coalition partnerships boast a division of labor among organizations. Each partner decides what to do within a broad framework articulated by the partnership as a whole and conducts particular activities. Partners are equal but bring different interests and skills to the arrangement. In educational partnerships, as in politics, coalitions work best when the involved organizations agree about a particular problem. Each partner has broad, and sometimes even very different, goals but believes solving the problem is necessary to achieving the broad goals.

When are coalitions appropriate? When partners agree about a specific problem in a community even if they disagree about goals or about the causes of the problems. Work can begin to solve the problem without having to address the many areas of disagreement. Coalitions are particularly useful in divided communities where there is shared concern about how well students are prepared to enter the workplace. Businesses can commit resources because they need well-prepared workers. Schools readily agree to participate to provide activities that motivate students to come to school and learn more. Community groups, such as local civil rights organizations, frequently become active boosters of such coalitions because they see increased opportunity for their constituents resulting from the partnership.

Coalition partnerships are exemplified by one partnership designed to facilitate the transition from school to adult responsibility that involves multiple partners, including businesses, a regional occupational center, an alternative high school for potential dropouts, a community college, a state university, the county employment services office, and the county Division on Aging. Each organization provides services to students, and, in some cases, two organizations provide the same service (e.g., developing programs and articulating coursework so students receive both high school and community college credits). Meetings of the full group are simply for information sharing as each organization has clear responsibilities for particular objectives and activities.

Coalitions are common forms of partnerships. They bring together organizations with complementary skills and interests. They promote focus, which concentrates efforts and can lead to major systemwide changes. A positive community impact can stem from demonstrating coalescence around educational issues.

Along with their value, coalitions are subject to a major limitation in that the partnership may be unable to shift activities to address new concerns. For example, if community concern shifts from school-to-work transition issues to worries about elementary school mathematics and science teaching, the partnership cited above would not be able to make the change. This is because the organizations involved have no particular expertise in elementary school science and mathematics curriculum, and the nature of a coalition limits opportunities to discuss new concerns. However, some partners might build on their current experience to develop new coalitions.

Collaborative Partnerships

A collaborative partnership involves division of labor among equal partners; however, decisionmaking is a continuous process and shared among partners. Each partner is empowered to participate in all decisions. The partnership becomes an organization in itself, eventually achieving legal status in many communities. Among the OERI-funded partnerships, for example, several have become not-for-profit organizations in which representatives of the partners serve as the board of directors.

When are collaborative partnerships appropriate? In communities with a shared concern about a problem or set of problems that can only be solved by involving multiple organizations. Further, participants recognize the limits of their expertise and the value of others'. A common issue on which partners move to collaboration is in preparing infants and toddlers for elementary school. Public school representatives recognize the importance of child care and health agencies in providing a base for school readiness. Child care and health agencies recognize the value of working with schools—where the children will eventually attend. All acknowledge the importance of preventive medicine in preparing students for school. And businesses are pleased to be involved in a program that increases mothers' attendance at work and provides the base for improved educational outcomes.

Furthermore, collaborations work in communities in which a shared sense of crisis or of hope exists, accompanied by a shared sense of confusion about what should be done to move forward.

One community that received funding from OERI, for example, was the bellwether of the economic downturn. Three major employers had left, and the fourth, the largest, was engaged in major layoffs. In fact, it recently announced it was closing its plant. Small businesses, political organizations, civic groups, civil rights organizations, the local public schools, welfare organizations, health agencies, local charities, and the community college all expressed concern about the potential "death" of the community. Although many ideas were floating around, no one felt he or she had the ultimate answer. The partnership was proposed as a way for people to come together, decide on priorities, and undertake programs to improve education and support economic development.

Although not yet fully developed, the resulting communitywide partnership aspires to and is moving toward collaboration. The governing body represents a variety of businesses, community service agencies, and the city and county schools. Decisions are made by work groups designated by the governing body, either through votes or by building consensus. In any event, whatever is decided is implemented by all participating organizations. Of course, some problems in implementing the model occur, but participants are clear that they wish to iron out the problems rather than change the structure.

Collaboratives are difficult partnerships to develop. They require building trust and understanding and solving problems in new ways. They require, for example, business partners' understanding of schooling processes and school partners' understanding of how businesses operate. At base, participants must come to understand that the knowledge held in one organization is different from, not better than, the knowledge held in another. Once that understanding is developed, the needed level of trust exists to acknowledge problems and use combined expertise to solve them. In the OERI-funded partnerships, we found a great deal of concern about exposing organiza-

tional problems to others. As a result, collaborative relationships frequently go through early difficulties. However, if the difficulties are addressed, the partnership is able to accomplish the goals it set out to achieve, adapt to changing circumstances, and increase its scope in terms of numbers of partners and issues being addressed.

Within the OERI-funded partnership projects, we found no examples of "partnerships in *name only*" although we know they exist in the nation. In such "partnerships," one or more participants donates money or goods without further involvement in the activities. Such arrangements may serve positive purposes, but they are outside the focus of this guide.

Identifying problems and deciding on an appropriate organization are necessary to beginning a successful partnership. However, equal attention to developing shared expectations of what partners contribute and the programs the partnership will sponsor also is required. These expectations result from prepartnership conversations.

Why Is It Important To Hold Prepartnership Conversations?

Participants need to have the same ideas about what each is going to do, what practical changes the partnership will require, and the content of partnership activities.

Participants need to have the same ideas about what each is going to do, what practical changes the partnership will require, and the content of partnership activities.

Once potential partners agree that a particular problem or set of problems should be addressed through a partnership and have a general sense of the appropriate structure for the partnership, another set of conversations is needed. These conversations, which we've termed "prepartnership" conversations, result in real commitments of partners' resources. In contrast to the conversations that explore whether a partnership is desirable, which can take place either through individual meetings or in one large meeting, prepartnership conversations are held in ways related to the likely organization. For example, some hold discussions about a collaborative in a meeting of all potential collaborators. It's also probably best to have a group meeting when developing a coalition. However, primary/limited partnerships can be established with a series of one-on-one conversations.

The purpose of the prepartnership conversations is to ensure that partners begin their formal relationship with matched expectations about three matters. First, potential partners need to agree on the roles they are expected to play, including time and financial commitments and staff assignments. Second, there should be discussions about the program content being addressed. Third, if external funding is being sought, potential partners should learn about what they're expected to do to get the funding and how funds will affect work *within* each participating organization. There is no particular order in which these issues need to be discussed. The point is that all must be decided upon among the partners.

Why is open conversation so important? The prepartnership conversations enable partners to understand one another, their major concerns, and the constraints under which each operates. In Section IV, we provide more details about issues to be explored with potential partners in these conversations and as work continues. Now, we want to emphasize the value of holding conversations and urge that all participants be open in their communications. We found, for example, that partners who openly acknowledge limitations on their activities were able to form strong partnerships.

One business partner in a school-to-work transition partnership was experiencing a downturn as the early discussions took place. School personnel had originally approached the business to become a partner to provide paid job placements to students. The business representative supported the goals of the partnership and wanted to participate, but could not promise job placements as a result of his business problems. He agreed, instead, to sponsor internships that were funded through a job training program. With that understanding, the school and other social service agencies involved in the partnership were able to seek "second placements" into paid jobs of students who were successful in their first, nonpaid placement. Students, at this point, are positive about the program without disappointment that there are no jobs resulting from their first placements. Employees at the participating business take pride in their success rate in preparing students for the "real" placement.

Some partnerships begin with great promise, but deteriorate because one or another partner has promised more than he or she can deliver or some partners misunderstood initial promises.

One glaring example of such miscommunication happened in a partnership involving a number of businesses in the community. The partnership is a coalition, designed to facilitate the school-to-work transition. During early conversations, in which school district representatives held with individual businesses, potential business partners were asked, "Are you willing to have students come to your business to learn about what you do?" All answered positively. Once the partnership began, school personnel called the businesses to arrange for students to spend about a week at the job site, "shadowing" employees. Only 15% of the businesses who earlier agreed to participate accepted students for the extended time. The rest said, "I thought you meant, 'Could students come for an afternoon tour of the facility?' Having kids here for a week would disrupt our business." The miscommunication had negative effects on other partnership activities as well because school personnel felt the businesses led them astray, and the businesses ended up thinking school people were pushy and didn't understand the "real world."

Businesses, social services agencies, museums, or schools may overpromise or overextend themselves. For example, in their enthusiasm for working with schools, businesses may agree to internships for students without clarifying the nature of the demands on them or exploring the insurance requirements. There were businesses that were unable to fulfill job placement promises in factories legally defined as "hazardous." In other instances, school district personnel may promise the involvement of teachers with whom they have not discussed the program. We found teachers

who, in some instances, refused the level of participation required by the program, citing the demands of other innovations or the limitations of the union contract.

Who should be involved in the conversations? One way to ensure that promises are reasonable is to involve all those who will be expected to *change their behavior* as a result of the partnership. By "changing their behavior," we mean acting differently on the job from traditional actions. Although chief executive officers of schools (superintendents) and businesses (presidents) may agree to become partners, for example, individuals on the line—principals and teachers in schools, and human resource directors and supervisors in businesses—are the ones who usually must change their behavior. Consequently, the agreements made by their bosses may not be reasonable. For example, teachers may be asked to work with businesses to change how they teach classes. Principals may be asked to release students so they can visit businesses. First-line supervisors in businesses may be asked to serve as mentors to students. These activities may require major changes in behavior.

How can overpromising be avoided? In general, overpromising comes when the person making the promise doesn't understand the changes it involves within his or her own organization. One task, then, for the prepartnership conversations is to define the changes in practice required. Then, potential partners can check within their own organizations to see how reasonable the promises are. It isn't necessary to know the procedures others are using to find out what's reasonable within their organizations. It is necessary to have assurance that they're doing something. It's difficult for one partner to know what burden the partnership will place on others—it should be discussed with them *before* they're obligated. The promise may need to be modified or the partnership may need to provide greater incentives or help to participants than originally thought. Many partnerships choose to include representatives of the "worker bees" within all participating organizations on their boards or create advisory groups of the front-line workers to ensure that promises can be kept.

Why is inclusion in discussions so important? Demands on workers, whether in schools or other agencies, vary depending on the partnership's program content. Some partnerships increase the size of an already existing program while others focus on changes in practice. Only those who are asked to change can speak about how difficult it will be.

One partnership, aimed at reforming the educational system, is an example of the importance of involving those who must make great changes. In it, three schools were designated as models, providing the basis for later expansion. None of the staff in the schools was consulted prior to the partnership. In two schools this was not a problem because the partnership provided additional resources for activities already under way and did not demand behavioral change. In the third, however, implementation is slowing, in part because neither the principal nor the teachers understands why they are involved, what might be gained, and how partnership-sponsored activities fit within their own vision for the school.

School sites are not the only ones ignored in prepartnership conversations. In the funded partnerships, there were examples of two nonschool agencies that assumed the interest of the school system, and of school districts and businesses *assuming* the interest of intermediate educational agencies or social service providers. In all such cases, there were major implementation problems, and, in at least one, the resulting problems seemed unsolvable. In the others, extraordinary efforts during early implementation days seemed to mitigate the problem.

We can't advise on the changes partnerships should entail or whether they should be bold or limited in actions. We can advise that conversations need to involve everyone to result in partnership activities that are reasonable. Partners will accept limits in what's possible to deliver. They cannot accept promises that aren't kept. We believe the only way to ensure that promises are reasonable is to involve all partners in the prepartnership conversations.

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Why should the content and objectives also be discussed? The specific activities and changes to be implemented constitute the content. Outcomes are the objectives to be reached. The content of the partnership is designed to address the problems identified in early conversations. At this point, partners must talk about the activities they will carry out in order to achieve the objectives. For example, assisting students to make the transition to adult responsibility can involve different types of activities. Will there be "job-shadowing" experiences? Business people visiting classrooms? Changed curriculum? The discussion can determine whether job placements will be the measure of success.

Can content and objectives be the subject of conversations after the partnership is formed? There were, among the funded partnerships, examples of working to "sign on" organizations and individuals with the promise that specific partnership activities would be agreed to by all involved *after* the partnership was under way. This led to some major problems. First, developing collaborative governing practices is extremely difficult, and if the discussions focus on "what should we do?" there is much second-guessing of potentially hidden agendas. Trust is more easily built when people work together on an activity. Second, when partnerships do not address content before they begin, there is a lag between the formation of the partnership and the actual implementation of activities. During that period, many, particularly in the community and at school sites, lose faith in the value of the partnership. As a consequence, partners lose commitment to working through problems that arose when activities began. Third, in at least one case, the absence of content discussion reflected the pursuit of individual organizational agendas—validating beliefs in hidden agendas.

In contrast, when partners discussed activities prior to formalizing the partnership, implementation was far easier, even when there were objective problems the partnership had to deal with.

In partnerships in which computer technology was central, for example, most experienced long delays in installing equipment caused, in part, from antiquated school buildings. However, in each case, the participants were aware of what the program entailed, how activities were dependent on one another, and waited, without losing belief in the project, until new electric outlets were installed.

Successful early conversations end with matched expectations, shared understanding of the contributions of each partner, some understanding of the constraints under which partners may operate, and agreement to move forward.

Successful early conversations end with matched expectations, shared understanding of the contributions of each partner, some understanding of the constraints under which partners may operate, and agreement to move forward. Even if representatives from all levels of the organizations involved in the partnership have participated in the prepartnership conversations, once a partnership is formed, others should be told about it.

When the Partnership Is Announced in the Community, What Information Should Be Shared?

The community should be told

- **why the partnership was formed;**
- **its content and activities;**
- **the anticipated results;**
- **the contributions of each partner;**
- **the support that will be provided to those involved; and**
- **how to gain access to services.**

Communication is crucial immediately following the formation of the partnership and throughout its life. Although key representatives of participating organizations may have been involved in prepartnership conversations, it is impossible and probably undesirable to involve all those who will be affected by the partnership before it is organized. Consequently, the period immediately following the formal establishment of the partnership is an important time to communicate with teachers, business people, and community members about partnership activities. The entire process of implementation is essentially a communication process, in which increasingly sophisticated and subtle understanding of the content and structure occur on the part of both partnership initiators and those with whom they work.

The nature of the conversations should focus on five issues: (a) the reason for the partnership, including the problem(s) it is designed to address; (b) the content or activities being implemented; (c) the roles each individual is expected to play in implementing the partnership and its program, including demands on their time and energy; (d) the supports they will receive as they implement partnership activities; and (e) how to gain access to services being delivered.

The community at large should be informed about the reason the partnership was formed. This can be done through public meetings, notes to parents, or news releases. When the partnership sponsors events, the partnership should invite the community. Each organization in the partnership should communicate, through its regular channels, about the partnership, its events, and its accomplishments. Partnerships help build support for education by using the multiple communication networks. Each partner has to talk about what's going on.

Why is it important to tell others about the reasons the partnership was formed? People who will be doing the work must accept the validity of the problem and its importance if they are to be as committed to solving it as are the representatives of the organizations who formed the partnership.

How can their commitment be gained? The first step is to openly share the information that led to the concern. If worries arose about student work habits after talking with business people, it is important for faculty to know about it. If partners think teachers should use technology to develop students as active learners, then teachers should be exposed to the value of active learning by sharing articles or demonstrations with them.

What methods are useful for communicating the reasons for the partnership? That depends on the problem it addresses and the demands it places on those who will implement the program. At one extreme, if the partnership is providing additional resources to enhance already existing work, a newsletter or large meeting may be

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enough. If major changes are required, deeper understanding of the reason for the partnership may be necessary. Such understanding is generally developed in a series of communications rather than in a single shot. For example, it may require a training session followed by on-site assistance.

How should specific information about partnership content be shared? That depends on the audience. Although many in the community may only be interested in the fact that a partnership exists, those most closely involved need information at a deep level, including not only what the partnership will do and why it will do it but how they will benefit from the efforts they put in. Send them brief summaries of the reason for proposed activities early in the process and include information about benefits and a schedule for future information sharing. Some partnerships use television public service announcements for the general information sharing.

What information about who will carry out specific activities should be shared? People need to know not only what they are expected to do but what they can expect of others. The community at large also is interested in who is going to do what within the partnership. Early communication should be explicit and praise the commitments made. This builds community support for the partnership and, more important, for the efforts to solve a real problem. As a result, there'll be a base of good will when problems arise, which at the least will provide a cushion of time for solving them and might lead to additional help. At this early stage, print information is sufficient. However, target the content to particular audiences.

How can people who participate in the partnership learn about the help they can receive? Early communication also should include information about the help the partnership will offer those who must implement partnership activities. This is most important for teachers and workers in businesses whose practices will change. Partnerships that use tutors to help students, for example, should let business volunteers know of how they will be helped to become comfortable working with kids and the content of the curriculum. Simultaneously, the teachers whose students receive tutoring should be informed of how the program will work and the help they will get in identifying students and scheduling tutorial assistance. General knowledge of the support being offered also is important to the community so members know that the effort is multifaceted and serious. Public meetings, press releases, memoranda, and other formats designed to reach large audiences are appropriate.

Who needs information about gaining access to services? Everyone. If the partnership includes preschoolers and their parents, communication through clinics, child care agencies, doctors, and welfare organizations is important. If the partnership includes job placement services, all school guidance counselors and teachers, as well as parents and members of the community, should know of its existence. One successful method of reaching clients is to hold meetings or write personalized letters to individuals who provide services to them. In addition, potential clients can be reached through well-designed brochures, which should be placed in locations they frequent. One OERI-funded partnership, which served high school dropouts, sent a worker to the bus station to talk with runaway youth about participating in the program.

Frequently, partnerships start small, serving a limited group of individuals before reaching a wider audience. When that is the case, communication of who is eligible and how they became eligible must take place to ensure the community of the program's fairness. The OERI-funded partnerships found that people were willing to wait for service if they understood why some were served before they were.

Early communication requires both the appropriate message and the appropriate tone. That is, partnerships, particularly coalitions and collaborations, exemplify particular models of organizational relations, and these models should influence how individuals are treated within and across organizations. Coalitions are built on the premise that the combined knowledge and interest of participants is greater than individual organizational clout. As teachers and others begin to participate in the coalition, their knowledge and interest should be recognized as well. Similarly, in collaborations, which focus on shared decisionmaking and mutually agreed upon divisions of labor, participants should be involved in decisionmaking about specific activities.

SECTION III

HOW DO SUCCESSFUL PARTNERSHIPS BEGIN IMPLEMENTATION?

In successful partnerships:

1. **Leadership builds commitment and gathers resources.**

2. **Resources are used to help participants become comfortable with and adept at new ways of performing.**

In the early days of a partnership, participants, whether partners, clients, or community members, may be uncomfortable about how what they do every day is changing. Opportunities should be provided for them to develop shared understanding of the reasons for the discomfort and how they can work through it. We cannot provide a list of actions to take toward the goal of mutual understanding and changed behavior—that depends on what people did before and the extent of the changes required by the partnership. Instead, we offer some ideas about how to help participants become comfortable with and adept at meeting new challenges.

Partnerships change what people do each day and how they relate to one another. These changes raise two universally shared concerns that should be addressed in the partnership's structures and processes. The first concern is captured by the question, *"Do I know what I'm supposed to do?"* The second is, *"Am I capable of doing it?"* Both concerns are shared by people at every level of the organization, even when they agree that change is needed because results of current practice are inadequate. They are most easily addressed when participants understand how the proposed changes will improve results.

What kinds of changes are people asked to make? That depends on how the partnership is organized, who is involved, and the activities it sponsors. In some cases, the changes are minor, asking people to do more of what they already know how to do. The only problem that can arise is if the "more" becomes "too much." However, substituting more of something they regard as important for some activity they value less makes implementation easier. One example of such a change is encouraging vocational guidance counselors to help students find appropriate community placements from a list they are given and relieving them of some scheduling responsibility.

A different sort of minor change occurred in one project in which a human resources director in a retail business had, among other responsibilities, the job of coordinating employee voluntarism. Prior to the partnership, the job involved posting community opportunities on the employee bulletin board and negotiating with supervisors about release time. After the partnership's inception, the volunteer coordinator job became more collaborative, and she began recruiting volunteers, organizing training for them, negotiating policy changes within the company to facilitate the activity, and providing rewards for volunteers and their supervisors.

In partnerships, who is asked to make the greatest changes? Two types of participants—high-level decisionmakers and teachers.

In primary/limited partnerships and for some participants in coalitions, decisionmakers were asked to change less than they were in collaborations. Indeed, the demand for change that collaboration places on people who think they've made it to the top is one of the most difficult barriers to success in partnerships of this sort. Collaboration asks decisionmakers to transform themselves from acting as solo performers, free to decide matters unilaterally, to becoming part of a team of decisionmakers. It's important for decisionmakers to make this change—it sets the tone for how others in their organization work across organizations. But it's also a difficult task. Collaboration relies on trust, which is built by working together on common problems. Frequently, these collaborative partnerships draw on group facilitators to help develop team decisionmaking.

Although changes in the practice of high-level decisionmakers are greatest in collaborative partnerships, teacher roles frequently change in any partnership structure. At the very least, partnerships bring teachers in contact with representatives of business and service agencies. Moving teachers from isolation in their classrooms is a major role change in itself. Other changes we saw were in programs directed at changing curriculum and instruction, which tended to use "lead teacher" or "teachers training teachers" approaches. In these, a small cadre of teachers receives early training in the changed approach, and they, in turn, train additional teachers. This constitutes a major change in the role of teachers who generally work exclusively with students.

Changing the role of some teachers vis-a-vis others requires more than developing the expertise needed for them to train their colleagues. They also need to learn how to relate differently within their school. All too frequently, partnerships attend to the former while ignoring the latter issue... Again, content assistance should be accompanied by assistance in changing roles.

Changing the role of some teachers vis-a-vis others requires more than developing the expertise needed for them to train their colleagues. They also need to learn how to relate differently within their school. All too frequently, partnerships attend to the former while ignoring the latter issue. Later, we'll discuss the type of assistance teachers need to change their teaching behaviors. Again, content assistance should be accompanied by assistance in changing roles.

What other kinds of changes do partnerships entail? Principals and business people may experience change in how they relate to colleagues and subordinates. Business representatives, used to working independently, now consult with one another about matters that affect the partnership.

In one partnership, for example, participating businesses agreed to follow a set of guidelines about student placement in mentor programs, including the time employees would be released for participation. A more subtle change in the relationship, between a business leader and a principal, occurred in a collaborative partnership. The business leader offered a set of field experiences to high school students and was dismayed that the principal required permission to leave school each time. From the business perspective, once the program was agreed upon and put in place, students should be available for participation. The school perspective focused more closely on the potential for liability claims and missed classes.

These sorts of changes are the most difficult challenges partnerships face. We found examples of principals who felt diminished that a teacher sat on a partnership governing board.

In one such case, the principal had been the sole source of information about what was going on throughout the district but now was joined on the partnership governing board by a teacher who had access to information and people. Both the principal and teacher had to work through the new relationship. How they did so, and how other members of the partnership helped, is instructive.

Partners became aware of the problem when the teacher asked to be "let off" the governing board. She claimed that the time away from her students was disruptive and interfered with their learning. Because the partnership project director valued her input and was concerned about continuity on the board, he scheduled a meeting with her to try to talk her out of the resignation. During their conversation, it became clear that her discomfort, while related to concerns about her students, was equally related to the change in her relationship with the principal. He had selected her for participation because he respected her work but now seemed to resent her. The director talked with the two of them, separately and together, and suggested ways the teacher's increased access to information could enhance the principal's influence with teachers and parents. As the principal began to see that he could share the role of "expert" with the teacher, the relationship between them became easier. She did not concede her new found influence but used it to work with him to improve the school.

The solution to problems like this, which are inevitable, is in talking with the people involved and hearing their concerns. Listen carefully because they may not be aware of exactly what is bothering them. Once a relationship problem is identified, it is usually easy to find a mutually satisfactory solution by offering suggestions to those concerned. When an approach seems comfortable to all concerned, it should be tested for a set period and then reviewed.

How Can Partnerships Help People Know What They're Supposed To Do and How To Do It?

Partnerships can help people know what they're supposed to do and how to do it through appropriate leadership and by providing support.

Different partnerships require different degrees of changes from participants. For example, some partnerships ask teachers to change their relationship to students (from giver of information to facilitator of student-constructed knowledge), the materials they use (from print materials to computer materials), and perhaps how they relate to other teachers (from equals to either receiving training from or giving training to other teachers). In contrast, others ask for less encompassing changes, such as the acceptance of an occasional tutor. Further, some partnerships ask many people to change; others focus on fewer.

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What Is Leadership in the Context of Partnerships?

Although we use the term "leadership" to identify a function rather than a person, frequently leadership resides in an individual. Even within collaboratives and coalitions, one individual can provide the focus and vision associated with leadership. Conversely, even in a primary partner/limited partner structure, leadership may reside in an organization, not in an individual.

Leadership within partnerships is a complex phenomenon. First, appropriate leadership styles for partnerships in some ways depend on the nature of leadership in the participating organizations and the structure of the partnership. In order to create an appropriate balance in a partnership, when participating organizations have strong leaders, there should be a different form of leadership for the collective effort. Similarly, the primary/limited partnership structure requires different types of leadership than does a collaborative or coalition. Consequently, three types of leadership help support partnership implementation under different circumstances.

In partnerships with *distributed leadership*, partners share responsibility for decisions affecting partnership operations. They may meet to develop consensus or vote or may agree on ground rules that govern action without frequent meetings. Distributed leadership supports partnership activities by enabling participants to adapt to changing circumstances or unforeseen problems. An example is a school-to-adult-responsibility transition project with many partners. Much of the activity takes place with two partners working together, and each dyad is empowered to work out whatever arrangements are necessary to achieve success.

When is distributed leadership appropriate? When all partners have strong leaders, as well as in coalitions and collaboratives. It is *not* appropriate in a partnership with one organization with a weak leader because the weak organization won't be able to pull its weight. The failure will lead to implementation problems and create distrust and anger among other partners. Leadership of this type also is inappropriate in primary/limited partnerships, which rely on the strength and vision of one partner.

Facilitating leadership is a type of leadership that frequently works behind the scenes to help partners in both programmatic and organizational actions. Such leaders ensure that content assistance is provided when needed and work with all participants to ensure smooth operation of the partnership. This type of leadership is particularly effective in partnerships in which participating organizations have strong leaders themselves.

An example of facilitating leadership is in a collaborative partnership that has the goal of changing the entire educational system, including relationships between schools and businesses and between schools and social service agencies. Partners are the major business organizations, social service agencies, health care providers, and volunteer organizations, as well as the local and intermediate educational agencies. Most are led by strong individuals. The partnership leader facilitates the work of the group in a number of ways, primarily by making the rounds of the organizations to work with individuals and

small groups to develop consensus about partnership direction. The leader enters formal partnership meetings knowing how all partners feel about matters and only moves on those in which he knows they agree upon so there are no public arguments. In addition, he visits participating schools as a trouble shooter and intervenes to resolve any problems that arise between school personnel and business or other partners.

When is facilitating leadership appropriate? In all three partnership structures. However, it relies greatly on the skill of the leader of the *partnership.* When each partner has a strong leader, the facilitative leader must do much work behind the scenes. He or she must have fairly low ego needs. Further, it is particularly important for a facilitative leader to be good at sensing and solving problems and helping others reach consensus.

On the surface, the facilitating leader may look like a manager rather than a leader, simply assuring that arrangements are made and things are getting done. And, indeed, many partnerships are managed, not led. The difference is that facilitating leaders don't simply carry out the wishes of others; in addition, they move the partnership toward developing and enacting a vision. They elicit the visions of participants and move toward synthesizing different, and sometimes competing, visions.

In contrast to facilitating leadership, *visionary leadership*, in partnerships as well as in organizations, already holds an image of where the partnership should go, both programmatically and organizationally. Visionary leaders seek to communicate their vision to all participants and seek ways of achieving it. The visions of leaders range from the grand, such as ensuring equal educational opportunity for all students, to the particular, such as increasing the numbers of students who choose careers in math and science.

Visionary leadership can sometimes overcome many problems.

In one partnership, for example, two participants are opportunistic, and the visionary leader is the leader of the third participating organization. His vision and charisma are such that he has been able to maintain the commitment of the schools despite a slow project start and concern about the motives of the others. He, like other visionaries, communicates his vision directly and through others.

Another visionary leader selected lieutenants who share her goals. She provides both symbolic and actual leadership but delegates much negotiation and problem solving to the lieutenants.

When is visionary leadership appropriate? In every type of partnership. The visionary leader, however, must be extremely skillful if one or more of the participating organizations also has a visionary leader. In such a case, the partnership vision needs to build upon the existing organizational visions, and the partnership's visionary leader must be able to share space and credit with the other visionaries. Frankly, few visionaries are able to share the stage in this way. Their strength is in their ability to

communicate and convince others, and their weakness is their lack of ability to accommodate other visions.

Partnerships need to address the leadership issue. Doing so requires assessing the type of leadership that exists in the participating organizations. This will steer toward or away from certain leadership styles. Match the leadership style with your partnership organization, avoiding attempts at distributed leadership in a primary partner/limited partner structure. Of course, look at the skills of those who will lead the partnership. Finally, it is possible to *decide* whether to have distributed or facilitative leadership. But visionary leadership isn't possible if a partnership has not begun as a result of individual or organizational vision. However, it *is* possible to move toward visionary leadership by developing a shared vision among partners.

All types of leadership can be exercised well or badly. In successful partnerships, the leadership is appropriate to the context and is exercised well, thereby assisting participants in understanding the roles and relationships and changing their behavior.

All types of leadership can be exercised well or badly. In successful partnerships, the leadership is appropriate to the context and is exercised well, thereby assisting participants in understanding the roles and relationships and changing their behavior.

What do leaders do? They set the tone for partnership success, inspire partners and clients, share the information necessary to carry out activities, and gather resources to help participants become comfortable and adept at the new approaches to practice. Successful partnerships are particularly attentive to the support provided by those charged with carrying out program tasks.

What Support Is Most Helpful in Partnerships?

Four types of support are most helpful in partnerships:

- **time to plan;**
- **training;**
- **matching people to the position; and**
- **technical support/content assistance.**

When should planning time be used? Planning time matters most when participants already possess the skills required by project activities and are asked to expand the arenas in which they use them. For example, in a partnership that builds on existing programs that already place student interns in businesses by expanding the number of students and businesses involved, those responsible for implementation need time to address the logistics of the increased scope. They need time to call businesses, inform them of the program, find out whether they will take students, and arrange for student transportation. Planning time accomplishes this.

As the partnership begins, the partners should match schedules so planning time can be arranged without conflicts with other activities required by their organizations. For example, many schools have teachers come to work a few days before students begin the year. Partnership planning time should not interfere with this expectation. Planning also should be scheduled for long enough blocks of time for problems to be identified and solved. It also should occur at times when individuals are fresh. This argues against using a lot of after-school planning sessions.

In programs that require participants at the activity level to gain new knowledge or skills, planning time should be linked with training or content assistance.

What is training? "Training" refers to workshops or other experiences provided to enable partners to carry out particular tasks for which they are unprepared. Training may focus on general skills, or it may be relatively intensive, as in the teaching of software development.

Training is required, for example, for teachers to use technology in their classrooms and to change from didactic to student-centered instruction. Training in shared decisionmaking techniques also is usually required when site-based management is adopted. If a partnership requires activity-level participants to learn new knowledge and skills, they must be prepared to implement them. They need excellent staff development opportunities that enable them to learn and practice the new skills.

Training follows the design of effective staff development sessions. It provides information, allows participants to practice new approaches, and provides feedback. Most businesses and school districts already have experience in developing training workshops. Partnerships are valuable here because they share approaches across institutions and arrive at better ways of training than existed previously.

Training *may* be enough if the needed knowledge and skills don't require participants to make major changes in their roles and relationships (e.g., in a program where teachers integrate a computer-assisted component to an existing curriculum or counselors add an additional career interest test to an existing battery of tests). Training is not sufficient to support successful implementation, particularly when partnerships create major changes. In such cases, successful partnership development includes both training and technical assistance.

When is talent matching appropriate? When the partnership extends existing activities and calls for general skills. It is frequently overlooked as a resource. A partnership can be formed around existing talent, skills, and interest, or individuals can be recruited who come prepared for the roles and relationships required by the partnership. Sometimes matching involves finding the appropriate business or community member for a particular activity in the school. Other times, matching is used for hiring staff for the partnership.

Even in partnerships that require major changes for most participants, it's frequently possible to use the talent matching strategy. For example, every school district contains at least a few computer addicts who already know how to use technology in powerful ways to support student learning. They will only require minimal training in the specifics of the program and access to computers and software for their students. They can form the nucleus of workers at the activity level. "Matches" also can be formed by locating teachers, administrators, or counselors who have come back from conferences or summer workshops and have already tried new ways of working.

Another alternative is to find people who are unhappy because their current job doesn't allow them to do what they like best.

For example, in one partnership, two high school guidance counselors expressed frustration that scheduling student classes and arranging for college-bound students to take the tests necessary to gain entrance to postsecondary institutions left no time for them to meet with the noncollege-bound students. They also thought it would be useful to hear from businesses about the types of jobs that were available to the students, but, again, bemoaned their lack of time. The partnership selected these individuals for the school-to-work transition activities it sponsored.

Talent matching is a powerful aid to early implementation. It ensures that those already versed in a role are selected to play it in the partnership. Participants know what to do because they've done it before. Matching also may entail selecting for transferable skills and pertinent talents. Participants with an appropriate foundation can build knowledge of what to do in the new situation. In either case, successful partnership development depends in part on the characteristics of specific individuals.

Although talent matching eases early implementation, we offer a caution if talent matching is the only support. If others don't learn what the "talent" knows, partnership activities will disappear if the talent changes jobs or retires.

When is technical support/content assistance appropriate? ***Such support is crucial when major changes in practice are required.*** Technical support/ content assistance occurs when there is significant help related to the knowledge and skills required by the program provided to those charged with carrying out partnership tasks. It should be provided within the context, such as the classroom, in which the activity is implemented and include one-on-one assistance. In models of staff development, such support takes the form of coaching. There is feedback to participants about how well they are carrying out the activity. It is important, for example, when teachers become involved in curriculum development or site-based management, which requires additional skills and knowledge.

Group facilitators are another sort of technical support useful in developing the structures for a collaborative partnership. They help partners work out new relationships and decisionmaking processes. They, like other content assisters, also provide feedback on communication patterns and approaches to policymaking.

The greater the change expected of the participant, the more individualized and intense the technical support and content assistance should be.

Support can take the form of materials, such as training manuals. Access to expertise within the partnership can come from coordinators central to the operation. They have the required knowledge and skills and help at the activity level. The coordinators can be reassigned as part of a partner's contribution to the effort or they can be hired by the partnership. Along these lines, another source of assistance is access to outside experts, such as paid consultants hired either by one partner or collectively by the partnership. Finally, a powerful mechanism is developing formal opportunities for participants to assist one another, such as in teacher networks.

We cannot emphasize this rule too much: ***The greater the change expected of the participant, the more individualized and intense the technical support and content assistance should be.***

Technical support helps participants learn and apply new skills. It also provides an arena in which they increase their understanding of the partnership and the relationships it requires because during the course of providing and receiving assistance, individuals share their understanding of the context and the program. Such sharing helps build the community within the partnership. It also provides information for strategic planning. Finally, assistance reassures participants that they are able to implement changes as required. Technical support and content assistance are the way successful partnerships foster continuous communication among partners, clients, and workers.

What's involved in providing technical support and content assistance? First, partners must agree to concentrate resources so implementation is successful. One factor in decisions about how many people to involve in specific activities is the number of individuals available to provide assistance. Another is the availability of resources, either funds or contributed time, for releasing teachers or business people from their normal duties.

Second, manuals may provide sufficient assistance. As we've indicated, that depends on the amount of change expected. If a partnership is requiring major changes in practice, manuals won't do the job. If the changes are minor, they will. In any event, providing manuals requires buying or developing them.

Third, the amount of assistance should be determined. That determination is, in turn, based on the rule of change—the more the change, the more the assistance. We urge too much assistance rather than too little.

Fourth, partners should identify the individuals who will provide the support. If they're within partner organizations, the partners need to agree whether their services will be an in-kind contribution or whether funds should be allocated to pay for their time. Either way, write the assistance activity into job descriptions and performance evaluation plans. If outside experts are hired, they must be located and contracts developed. The money to pay outside consultants or coordinators from inside should be allocated from the partnership budget.

Unfortunately, many partnerships structure few opportunities for assistance. In a misplaced belief that initial training and some support materials are sufficient, the more personalized technical support is frequently lacking. Partners argue that they can "reach more people" through these efforts. However, those reached are seldom able to implement major changes. Building a cadre of participants who are fully implementing a program requires that partnerships focus on resources. Content assistance is a necessary component so the appropriate trade off is "fewer, better" rather than "more, inadequately."

SECTION IV

WHAT IS THE ROLE OF EVALUATION AND PLANNING?

Successful educational partnerships use evaluation and strategic and adaptive planning to ensure that activities meet local needs and conditions.

Educational partnerships are successful when they meet the needs of the participants and the community. There is, as we have indicated, no single structure, leadership style, set of goals, or type of activity that leads to success. We cannot offer a road map for establishing partnerships. Rather, success comes when the partnership fits the context and adapts to changes and local concerns. We recommend that conversations take place before inaugurating the partnership. Those conversations have, as we said, several purposes. We repeat them here because they are so important in setting the tone and laying the groundwork for the rest of the partners' work:

- Prepartnership conversations provide information about how needs in the community are perceived. Talking with others about the problem that's been identified serves as an informal needs assessment. It may, as we recommend in this section, be supplemented by more formal needs assessment.

- Prepartnership conversations give insight into the context in which the proposed partnership will operate. This contextual analysis includes analyzing: past efforts at innovation, existing relationships among potential partners, the nature of accountability for the participating organizations, and the economic and social environment. More partnerships attend to substantive needs assessment than they do to the contextual analysis. We believe both are equally important.

In this section, we suggest issues to be addressed in the analysis of the substantive needs and context of a given community. Continually monitoring needs and contexts to find out if the partnership and the activities it sponsors continue to "fit" the community is necessary. Prior to the partnership and at its start, planning should focus on initiation. However, mechanisms should be in place that support strategic and adaptive planning, based on monitoring the context and evaluating the partnership and its activities.

The point is significant: ***Strategic and adaptive planning occurs throughout the life of a partnership.*** At the beginning, the partnership meets substantive needs and fits the organizational and social context. After the partnership is under way, sufficient feedback mechanisms must be in place so participants know how well structures and activities are working.

Few, if any, partnerships get it right the first time. Success does not depend on the perfect design. It depends primarily on how well partners respond to information they receive about how the partnership is doing. Evaluation is the common method of getting information about partnership activities. Successful partnerships have an evaluation that allows for adaptations of activities as it develops.

Successful educational partnerships use evaluation and strategic and adaptive planning to ensure that activities meet local needs and conditions.

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Who Should Be Involved in Analyzing Local Context?

Involve all potential participants in the research and analysis of the context.

Why? To accomplish three things. *First*, all perspectives will be represented in the discussions. For example, one issue that must be considered is the extent to which organizations can operate freely within the partnership. Organizations are frequently limited in what they can do, but those limits aren't usually known to outsiders. Involving all players facilitates shared understanding of limits on individual action and accommodating existing limitations into partnership expectations. *Second*, involving all partners and representative workers and clients helps develop mutually supportive understanding of the roles and relationships—and the reasons for them—that are designed into the partnership. *Finally*, such involvement helps build ownership of the partnership among participants.

What is involved in analyzing the context? Understanding the legacy of past efforts to improve education, existing (or past) relationships among partner organizations, the social and economic environment, and limits to action. The analysis should result in a partnership that works within existing constraints while simultaneously challenging them.

Why Is It Important To Understand the Legacy Of Past Improvement Efforts?

Every community and organization has a history of past efforts at improvement. This background of past undertakings, struggles, successes, and sometimes failures leaves a legacy partners must deal with. If the community has successfully implemented other special programs, there is likely to be enthusiasm about the proposed partnership. Alternatively, some people feel burnt by past efforts, which seem to have yielded little. Impressions and perceptions that remain, whether positive or negative, affect how participants will view the proposed partnership.

Understand that legacy and build upon it. In cases in which good feelings about past efforts exist, present the partnership as an extension of, rather than a replacement for, those efforts. This way plays to the positive feelings and doesn't leave participants with a sense that earlier hard and successful work is not valued and is being abandoned.

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In one partnership we studied, the partnership was organized with a vision of "21st-century" education. However, the school district had already begun implementing a nationally recognized and popular staff development program. Teachers were angry at the abandonment of a program in which they had invested much energy. Consequently, their involvement in the partnership was reluctant at best.

In contrast, another OERI partnership, also aimed at fundamental change in how teachers and students interacted, built existing programs into the new one. Teachers at the high school had been involved for two years in a collaborative rural humanities project that linked schools and institutions of higher

education throughout the state. That project became a component in the technology thrust of the new partnership. The new partnership also included some fairly new vocational courses while simultaneously creating additional courses. The result of using the partnership as an umbrella for related innovations was that there is a corps of knowledgeable and enthusiastic teachers who now train and support others.

As the examples indicate, positive effects of prior innovation can present either a barrier or a boost to a partnership. The difference lies in how the partnership uses the feelings generated by earlier efforts. In the first case, the partners ignored its existence and confronted a barrier. In the second, the partnership co-opted previous innovations. As a result, the partnership began with teachers feeling good about the new venture. They believed their earlier efforts helped pave the way for the new partnership, which, in fact, was true. They also were able to use the knowledge and skills they'd gained in new ways within the partnership structure.

But what if earlier innovations were unsuccessful or left negative feelings about innovation? One partnership confronted this situation.

The local school personnel had been involved in a successful community involvement program that became a model for the nation. About three years before the partnership began, the foundation supporting the program withdrew funds. This left cynicism about programs begun "outside" the schools. The partners made a particular effort to work closely with teachers and administrators at the school level, included funds for curriculum development paid directly to teachers, and allowed much flexibility in program development. The strategy was to invest directly in the skills of teachers. The leadership made the case that the partnership provided resources that wouldn't be lost because the investment was in staff talent. The result was teachers who, while remaining cynical, were willing to participate because they saw immediate benefits. The partners, however, should realize that continued teacher participation will require lots of support.

Negative residue from earlier innovations requires a convincing case that this partnership is different. One way of addressing cynicism is to state openly the reasons the earlier effort failed and to demonstrate what's been learned from the failure. The message, however, should be positive. It says, in effect: "We understand your feelings about change. After all, the last change process had particular problems (and list them). But we're designing a program that avoids those problems by (say how). In addition, we want you to tell us what you think is needed and how we can help." Suggestions must then be acted upon.

As potential participants discuss their innovation history, they should be honest about feelings and concerns. As our examples indicate, successful partnerships adapt to those feelings rather than suppress them.

What Are Prepartnership Relationships? Why Are They Important?

Prepartnership relationships refer to linkages that exist among organizations considering forming a partnership. They may help or hinder implementation, depending on the strength and value of earlier ties.

Many potential partnership sites have a history of collaboration among schools and other organizations. Few school districts in the country, for example, lack ties between schools and businesses through such mechanisms as "adopt-a-school" programs. Similarly, many schools have had relationships with institutions of higher education through serving as practice teaching sites for the preservice program, for example.

If earlier relationships are acknowledged and built upon while creating a new set of structures and activities, the partnership can extend existing activities. It can include new groups, provide resources for participants to implement the activities they desire next, and supplement efforts that are outgrowths of the relationships. Using a strategy of building on what exists tends to ensure some early successes. The early successes, in turn, raise confidence in the ability of the partners to tackle more difficult and longer term projects.

One partnership we studied illustrates how to build on preexisting relationships. The new partnership was developed in a context that was rich with interorganizational arrangements, including partnerships among the community college and the vocational program, private businesses and the vocational program, the local employment service and private businesses, health and human service agencies, and two local schools. The new partnership brought all these relationships together. The new relationships, however, involved the same staff members both to draw on their experience and avoid their feeling that their turf had been invaded. The new partnership also allocated resources to the "old" relationships as well as to new ones. These dyads were asked to participate in additional activities with the potential for systemwide and communitywide change. For all activities that involved a pair of organizations with previous relationships and organizations new to the arrangement, the partners were careful to include enough people so the new participants did not feel they were crashing a party.

Care must be taken so as not to ignore preexisting relationships.

Care must be taken so as not to ignore preexisting relationships. One partnership we studied was unsuccessful in its first year because it failed to deal with preexisting relationships.

This partnership involved training business volunteers to tutor elementary school students using a particular approach. The first school in which the volunteer tutors were placed had worked for many years with another business who supplied funding for classroom aides. The principal liked the earlier arrangement, which the new partnership replaced. She and her

teachers used the new volunteers as aides, which they, in turn, resented. By the end of the first year, neither the business nor the school remained in the partnership.

***Avoid replacing* a successful partnership with a new one.**

Instead, figure out whether the success is a result of the relationships that have been established or the program the arrangement sponsors.

If it is the former, the new partnership should build upon it by including the same staff from both organizations in any new activities. In this way, they won't feel displaced and create dissension against the partnership. Including staff members who already have a relationship across organizations gives a partnership an added benefit. Individuals from the organizations know one another. In many cases, some trust has developed, and it is probably easier to develop joint problem-solving techniques than in totally new partnerships.

If the success of the preexisting relationship lies in its program, the program should be included in the new partnership or, if the program is incompatible with its goals, it should build a program separate from the earlier one. This "separate-program" strategy may create resentment. In a large community, it's sometimes possible to have more than one partnership by focusing on a different neighborhood or a single program strand, but it is difficult in smaller towns. If at all possible, meet with members of the other partnership(s) to develop a plan for the new work.

A second issue to consider is the feelings of representatives who are already involved when adding new organizations to preexisting relationships. We've all had the experience of coming into an organization or a social setting in which everybody knows one another—except us. Feeling like an outsider is uncomfortable. The "experienced" representatives have come to understand each other's quirks as well as the reasons the organizations are involved. The new member of the group has to learn it all quickly. It's easy for distrust to grow under such circumstances. Consequently, if a partnership builds on existing relationships, the new members should be introduced carefully. Two or three new organizations can be simultaneously added. Also, team building activities should occur with the new group. Acknowledging the potential for a problem and then addressing it demonstrates that the new partnership is sensitive to the context.

How Can a Partnership Flourish in a Difficult Social And Economic Setting?

Demographic, social, and economic characteristics may affect a partnership. They have a great impact on educational endeavors. The organization, activities, and goals of the partnership should reflect the needs of the community to be served.

It's important to understand the most significant problems and issues faced by the community in order to establish a partnership that will improve educational opportunities. In addition to determining the most important educational problems through the economic and social conditions in the community, substantive needs assessment should be analyzed so the partnership fits.

Community analysis can be formal or informal. Formal analysis draws data from a number of sources. Included is census information about the size of the community, its demographics, and the economic status of community members. Also included are

data about the schools and the numbers and characteristics of students served. Attention should be paid to how the characteristics of the school population compare to the characteristics of the community. Are families with school children a small or large percentage of the community? Are there more or fewer racial or ethnic minorities in the schools than there are in the community? Other data include economic information about businesses, industries, housing stock, and employment.

Informal community studies also are valuable for building a partnership. The key is to be sure that all sectors of the community are included. Hold meetings to hear what residents and employers have to say. Make sure there are meetings throughout the community so representatives from all areas have access. Seek out the views of those who don't generally come to meetings. We found that partnerships organized by the local schools and an umbrella business organization, such as the Chamber of Commerce, frequently lamented the lack of involvement of minority groups.

One successful approach to involving racial and ethnic minorities was to include representatives of community-based and religious organizations in the community study. This laid the groundwork for support when the partnership began.

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Although it is probably easier to develop partnerships in communities with many resources and high levels of civic involvement, it is possible to develop successful partnerships even in areas suffering from depressed economies. Several OERI partnerships we studied were located in historically disadvantaged areas (i.e., areas with sustained patterns of economic decline and evidence of the subsequent poverty associated with such circumstances). Partnerships in such areas are especially important to developing programs that meet the needs of educationally disadvantaged and often underserved students. Unfortunately, poor economic conditions in a community also restrict opportunities such as workplace internships and other activities that require favorable job markets. Economic distress further curtails participation and time commitment to volunteer programs because individuals who might have been available for volunteer work find they have to work extra hours or a second job to support themselves and their families.

However, some partnerships were successful in the face of these conditions. One, for example, relied on community-based educational organizations such as museums and libraries to provide the types of activities that were in other communities provided by volunteers. Another, which included opportunities for students to experience the realities of the workplace, used business volunteers at the work site as tutors. The volunteers have become role models. Students occasionally shadow the workers, but there is no expectation that the time spent at the business will lead to a job. Students enthusiastically support the program, teachers are pleased with the improved skills of students, and the business participants maintain faith that when times get better, they will have a pool of workers ready for the job.

Partnerships can adapt to varied circumstances.

One project exemplified such adaptation in moving from implementation in an urban setting to implementation in a rural school district. The original design was for one business partner to supply sufficient tutors to a single school. The tutors

were trained as a group along with the teachers, thus building rapport. Further, there were activities at the workplace that supported the volunteer tutors and provided feedback and assistance. In the rural district, however, no single business was large enough to supply sufficient tutors. Consequently, the partners worked with a group of businesses, noninstructional school personnel, and high school students as tutors. The support structures and activities were adapted to the new setting.

In part, adapting partnerships to the environment requires common sense. If, for example, the school involved in a partnership is in a high crime area that volunteers are reluctant to enter at night, it might be necessary to take the students to the volunteers' work site or schedule activities for weekends. Or, it may be better for partners to address the problem itself than to work on purely educational programs. The analysis of the community and conversations with partners will facilitate sharing ideas about how best to design the program to fit the circumstances.

How Can a Partnership Cope With Limits to Action In One or More Participating Organizations?

Partnerships are affected by the rules and procedures that exist *within* the participating organizations. These mechanisms are outside the partnership structure. Partners who are obligated to go through bureaucratic channels outside the partnership to obtain approval for policy changes or program implementation essential to the partnership are accountable to external audiences. These limits often are barriers to partnership development. However, we found that partners are remarkably tolerant of the constraints under which their colleagues operate *if they understand what constraints exist.* Therefore, all partners should be encouraged to "come clean" about the limits under which they operate. Once the limits are known, the partnership can either design a program that can operate successfully within them or a collective strategy for confronting them.

Why is shared knowledge of organizational limits important? First, we found when one partner didn't understand the organizational constraints under which others operated, frustration and increased distrust of the relationship resulted. One partner would say, in effect, "We decided this. Why can't you just do it?" And the other partners would get angry because they, too, found the situation frustrating, but expected understanding, not criticism, from their colleagues. Second, understanding the limits provides the opportunity for partners to work together to change the organizational environment while addressing specific problems. Conceptually, partnerships that begin, for example, by focusing on curriculum change and run into problems with district and state rules about curriculum will move to a more systemic approach. And, indeed, we found at least one partnership that developed shared understanding of the constraints and began to work to address the systemic reasons for them. In another case, the partners said, in effect, "How can we help you deal with your limits?" This built the needed collegial spirit. Third, and probably most important, when partners know the limits on each other's activities, the program design can adjust timelines to accommodate them. As a result, partners won't feel something is happening "late" and become discouraged.

How can tolerance of each other's situation be strengthened? When partners understand that limits exist in most organizations and aren't confined to a single partner, they are more tolerant. In early partnership meetings, it is helpful for all partners to reveal the constraints in their organization. The following provides information about various sources of accountability. It is to be used as a springboard for analyzing the local constraints and as a source of ideas of dealing with them.

What are the sources of organizational limits? First, school bureaucracies sometimes require partners to receive approval for action on many matters. From the bureaucratic perspective, the mechanisms ensure that actions are in line with legal and grant requirements. In some OERI partnerships, the time needed for approval made action difficult. For example, partners could not schedule needed training in response to classroom observations. However, if, in contrast, the partnership is designed with knowledge of the difficulty of scheduling training, partners could have planned an in-service at specified times and left the content open.

In other partnerships, the negotiated agreement with professional staff limited the times and places for meetings related to partnership activities. Again, partnerships aware of such constraints at the outset were able to schedule needed meetings.

For example, the director of one partnership made regular visits to each participating organization. He gathered information and informally polled representatives about key issues. The infrequent meetings, then, were efficiently run, addressing only decision items. As a result, all partners were satisfied that they had input on important matters and the infrequent meetings of the group were not regarded as a problem to the partnership.

Parallel limits exist in social service agencies and business bureaucracies. In one OERI partnership, for example, the participating business did not approve a set of activities because its policy was to charge for particular types of training. In other businesses, employees must provide all volunteer services on their own time. Social service agencies frequently have constraints stemming from their requirement to protect the privacy of clients.

Bureaucratic constraints, although frequently justifiable from one perspective, can limit partnership activities. Designing partnership activities to operate within the constraints is one way to address the problem. Or, as did some partnerships, constraints may be challenged strategically.

One partnership sponsored an alternative school for high school dropouts and runaway youth. By combining the influence of committed school staff, social service agency staff, some businesses, and others in the community, the partnership gained school system agreement to adjustments in the attendance requirements. Another partnership convinced a business to provide matched release time so volunteers did not use up vacation and personal leave hours to participate in the program. The time involved in training for the volunteer work was release time because the partners demonstrated that the training would have immediate positive effects on the volunteers in their supervisory roles.

The limits should not be accepted as permanent, but neither should a partnership be designed that pretends constraints do not exist. Also, it should not be assumed that all accountability mechanisms are bad or should be abolished. During the planning process, potential partners should talk about the limits in their organizations and develop strategies for addressing them. *Open and honest communication*, even about difficult matters, makes it easier to deal with external constraints than ignoring their existence, which inevitably leads to frustration and frequently to distrust.

Any partner can encourage openness by modeling the behavior. Ask one another about constraints that may get in the way of particular activities the partnership considers sponsoring. If some partners are not open about their constraints and attempts to get them to be honest don't succeed, the partnership is doomed.

What Approaches Work for Deciding on the Content Of Partnership Activities?

Successful partnerships begin with some general, and shared, sense that there is a problem. At this point the problem is defined very broadly. To focus partnership activities, potential partners identify the prevalent needs of the community, region, or district in which they function. Such substantive needs assessments can be formal or informal. They can involve original data collection through community surveys or focus groups, or they can rely on already existing data, including national reports and information about student achievement and postsecondary success.

The partnerships carried out formal assessments. These included examination of national research on middle school students' loss of interest in math and science and a study commissioned by the Chamber of Commerce identifying deficiencies in the local education that hampered economic development. Partnerships also used less formal methods, such as meetings between the school superintendent and representatives of scientific industries, hearings held by community-based organizations, and the advocacy of a business leader who brought his concerns to a variety of organizations.

In principle, needs assessments are used to identify the key substantive issues for the partnership to address. And, indeed, successful partnerships tend to address critical needs. However, moving from the needs assessment to program development requires pulling together all the information about the community discussed previously. Partners should work together as potential participants to design a program that will both meet the substantive needs identified through the local needs assessment *and* be successful in the local context.

Some OERI-funded partnerships, for example, decided to implement small programs, which they felt would not demand more of participating organizations than they were able to give, while others encompassed multiple activities. The general problem of preparing students for the workplace translated in some places to small-scale mentorship and job-shadowing programs and in others into systemwide efforts to reform curriculum and instruction and integrate technical and general education. Similarly, efforts to integrate technology into classrooms ranged from starting small, adding a grade or subject area each year, to schoolwide projects that included multiple curriculum areas. Success depends on the fit of the activities to the community.

In moving from the general needs to specific activities, it's important to keep clear about the reason for the activities. There can seem to be a big leap between such needs as "to prepare students for the 21st-century workplace" and a job-shadowing program. Participants, including students and their parents, should receive information and an

explanation that links the activities to the broad goal. This is an underlying purpose of the postformation conversations we recommended earlier.

Ideally, educational partnerships reflect consensus about the nature of the problem and the needs of youth in the community. We found some educational partnership programs as much driven by the needs and interests of the business partner or institution of higher education as by the needs of the students. When those needs and school needs coincided, the partnership was almost guaranteed success.

Ideally, educational partnerships reflect consensus about the nature of the problem and the needs of youth in the community. We found some educational partnership programs as much driven by the needs and interests of the business partner or institution of higher education as by the needs of the students. When those needs and school needs coincided, the partnership was almost guaranteed success.

For example, a health careers program was implemented at a site where one of the principal partners was a hospital that did not have sufficient numbers of health care workers. The program served students comprehensively, offering counseling on required high school coursework, guest speakers, visits to the hospital, and volunteer opportunities. Although school personnel may not have identified the need to develop health professionals, they did identify the need to provide students with career opportunities. Consequently, both partners and participants agreed that the project is addressing a critical need. Given the economic conditions in the community, local students would have few chances of succeeding without external initiatives like those of the Educational Partnerships Program.

Less happy stories come when partners in the business or higher education communities identified a problem that school people did not believe existed.

One example comes from an economically depressed community in which a key business person and the local university began a partnership that focused on developing a kindergarten through 12th grade "high-tech" instructional environment. School people resisted the reforms, and little progress was made. Does this mean that partnerships can never address problems identified outside the schools? Clearly not. But it does mean that needs assessments should gather information about how the program will be received in the schools, and the partnership should use that information to design the postformation communication and the type and amount of assistance given within the schools.

Why Is Evaluation Important?

Evaluation matters because partnership design is not enough. Partnerships are unlikely to be perfect at the start. Despite the best efforts at openness, for example, a participant may not share information about constraints. Designs also may fail because circumstances change (e.g., the local branch of a key partner responding to changed policies of the national company). Or the needs assessment may have unwittingly overlooked

some information. Whatever the reason, partnerships, like other innovations, must continuously monitor and reassess their effectiveness. Evaluation serves to provide information to partners that facilitates such continuous assessment.

Many people and organizations try to avoid problems. In contrast, successful partnerships are "problem finders." That is, they constantly seek information that allows early identification of potential problems and take action immediately to address those problems. Evaluation in this light is a management tool.

How should evaluation be carried out? At the start, partnerships should establish evaluation systems. The systems should include information about the numbers of participants. It also should seek regular feedback about the perceived value of the program.

One partnership that sponsored visiting scientists in the classrooms, for example, sent teachers who used the services an evaluation form after each scientist's visit. Teachers reported that the level and tone of the scientists' presentations frequently were inappropriate for the grade level visited. The partners used the information to develop "coaching" sessions with the scientists—when the scientist is contacted, a partnership staff member works with her or him to develop the presentation. Over time, the partnership has developed a data base of scientists and topics that allows efficient matching of the person and the class. Without the feedback, the partnership would have been left wondering why teachers were not asking scientists to visit. With feedback, an activity that was failing has become a success.

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Seek feedback about the partnership organization and how partners feel about the relationships that are developing as well as about specific activities. While feedback about activities may be collected by partners themselves, generally feedback about the partnership itself should either be part of regular public meetings or be collected by a neutral party. Some partnerships use both procedures, making analysis of the partnership a periodic agenda item that includes an external evaluation of partners' concerns and positive feelings.

A process should be implemented in which the *impact* of the partnership can be assessed. The timing of data collection and reporting with regard to impact will vary depending on the activity. Some activities are designed to have fairly quick impact; others, such as programs to increase employability or knowledge of math and science, require more time. Partners need to be careful to assess impact at the appropriate time. However, prepartnership data should be collected at the start, and there should be agreement as to the evaluation purpose and design. Outcome indicators should be decided on early, and the data collection schedule widely shared so there are no surprises to partners. Information about impact can be used to generate additional external funding by demonstrating the success of the partnership to others.

Who should perform the evaluation? The evaluator can come from a partner organization as an in-kind contribution of one partner or can be hired on contract.

If the evaluation is an in-kind contribution, other partners may distrust the objectivity of the work. Also, the evaluation might be an add-on to existing duties. However, partners are assured that the "donated" evaluator is loyal to a partner and

has some stake in the partnership's success. With a contributed evaluator, the existing job description and performance evaluation criteria should be modified to include the assignment to the partnership.

Contracted evaluators have the advantage of appearing to be objective and not associated with any single partner. The disadvantage of using these contractors is that they are less likely to have a commitment to the partnership and have little stake in its success. The contract may be one of many they are pursuing, and if it's not large—and it need not be—they may not be available to provide results in a timely fashion. Frequent reporting dates should be built in to any evaluation contract. Reports can be in the form of memos or reports at partnership meetings, but they must occur regularly. One OERI partnership gained much insight from "confidential memos" prepared by the evaluator whenever important problems arose.

Perhaps the most important message conveyed to the evaluator is to gather honest feedback about the partnership. The importance of the evaluation in finding problems needs to be emphasized so the partnership can deal with them. And, when reports come in, use the opportunity to consider needed changes in the program or the partnership.

In this section we have argued that successful partnerships do not just happen. In the early stages, potential partners must engage in a tough-minded and open analysis of the local context. The context includes existing relationships, the residue of past efforts at innovation, the social and economic characteristics of the community, and constraints under which partners operate. The analysis and an assessment of the substantive needs of the community served should be used to design the partnership.

However, because circumstances and contexts change and because some things work and others do not, the partnership should put in place an evaluation system that continuously replicates the original analysis. The system also should collect information about progress and feelings. Finally, the evaluation design should include methods of assessing the impact of the partnership.

SECTION V

WHAT HAPPENS WHEN THINGS GO WRONG?

Successful partnerships acknowledge and confront problems, using them as the opportunity to build relationships among partners.

One reason we can't give a checklist for starting a partnership in a way that guarantees success is that there are sure to be unanticipated problems. Even good plans are challenged by unexpected personnel changes and loss of funds. When these problems arise early in the history of the partnership, they present major challenges to an operation. The good news is that successfully dealing with them strengthens the partnership beyond what seemed possible.

Most partnerships face challenges in their early days, and some are able to rise to meet them while others are not. The difference, we found, lies not in the difficulty of the problem, but in the approach to solving it. A number of partnerships we studied experienced major personnel changes or losses of organizational involvement. The process used to replace the people or organizations who left actually strengthened the partnership in two cases. In addition, almost all partnerships suffered from the economic downturn. Some approached budget cuts productively; others, less so.

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How Can Negative Effects of Personnel Changes Be Lessened?

Loss of key personnel or participating organizations is likely to have a negative effect on partnerships whenever they occur. When they happen before the partnership has gelled and activities are under way, they can devastate the enterprise. Personnel change can happen for two reasons. First, there may be changes beyond the control of the partnership, including death, unexpected career opportunities, and economic problems. Second, the partners may make a mistake and hire individuals who aren't able to perform. We saw examples of both kinds of problems.

How can partnerships cope with personnel changes that are beyond their control? When key personnel leave for reasons beyond partners' control, it can be an opportunity to cement partnership relations. Such personnel changes are unlikely to result in lots of blaming among partners so the position should be filled as soon as possible. The partnership steering committee or board of directors can generate a process that has the partnership acting in concert. Subcommittees should be appointed for each task, with all organizations represented, rather than, for example, dividing tasks among organizations, with one responsible for recruitment, another for screening. In this way, partners will work on a common task and build the relationship while simultaneously solving the problem they confront.

We recommend this approach because of the contrasting experience of how two partnerships dealt with the problem of personnel loss.

One experienced multiple losses through the death of the superintendent, who initiated the partnership; the bankruptcy of the key business involved; and the decision of another initiator of the partnership, who also was the university liaison and project manager, to accept an overseas position. In another, the superintendent retired and the key staff member who began the partnership left to join him in a private consulting business.

The contrast of how each partnership dealt with the losses illustrates differences between successfully addressing problems and failing to do so.

The first partnership, which lost most of its leadership, maintained the partnership planning committee it had established prior to forming the partnership. Its structure, although not its membership, remained stable. Further, both school district and university staff members were replaced on the committee. The commitment to using partnership resources to serve students remained strong. Replacement of key project staff, recruitment of new business partners, and subsequent revision of partnership goals were addressed through the committee and in the partner organizations. The planning committee actively recruited new business partners. Issues of program focus were resolved by groups of participants, with school personnel playing a particularly strong role. Although the vision has shifted, and is more in line with already implemented district activities, the commitment to partnership has not changed.

We referred to this project as a "Phoenix" project because it seems to have risen from ashes—although in somewhat altered form.

In contrast, the other partnership was very slow to address the problems. In the absence of the superintendent, an assistant superintendent was assigned partnership responsibility. She did not organize the partnership planning committee because the school board was reluctant to move forward until a new superintendent was hired. The board believed the new superintendent should shape the program, which meant that he or she should hire a project manager. Although the partnership grant was received in September, there was no partnership activity until January. The business representatives who had committed themselves to the partnership remained supportive, but, when called upon to implement proposed activities, were reluctant to do so. It seems they lost the vision during the long lag in action.

Despite the lost year, however, the new project director was able to generate sufficient support to begin activities.

Although it is too early to tell whether the original vision can be retrieved, the project demonstrates an important fact—even problems that seem devastating can be successfully addressed.

The two examples teach the following lessons. First, partnerships can weather their problems if the partnership remains active. Although both partners faced multiple problems, the message in one was that the partnership was a viable entity. In the other, the message was that the partnership was an arm of the school district. Loss of business commitment was, therefore, not unexpected. Second, even when there is no

one with the title of partnership manager (or project director), someone must attend to nurturing relationships. In the "Phoenix" project, the problems became part of the conversation among partnership participants. In the other, all issues were postponed until a future date. Third, the planning group in the first example decided to participate in some school-based activities already under way. This kept the partnership in the public eye. In contrast, four months of inactivity in the second district allowed potential participants to forget their commitments, and there was no vehicle for reminding them.

What happens when personnel changes result from mistakes in hiring? In this case, the problem is greater than if the person simply moved on. There will be anger and blaming among partners. Partners should analyze why there was a mistake: Was the problem in the job description? In the search procedures? In the interview process? Swift movement from blaming to analysis is urged, along with involving all partners in the analysis. The goal is to recommend a procedure that will remedy problems and ensure success. The procedure should be accepted by all partners and then implemented.

Although our recommendations will lead to a longer timeline for replacing the staff member, the sacrifice is worthwhile as judged by the success of one OERI partnership.

In it, a staff member responsible for carrying out a critical partnership activity presented problems. His obstructionist attitude and irregular performance led the oversight committee to ask for his resignation. Although partners recognized the difficulties created by the behavior, they did not agree on how to handle the situation, particularly because the individual had been recommended by a partner. The request for his resignation created some friction among partners. However, partners viewed the process of searching for a replacement as an opportunity to relieve some of the tensions. They saw the search as a chance to develop a problem-solving process for the partnership. Partners collaboratively decided upon the membership of the search committee and the procedures for searching and screening. Perhaps most important, the partner most closely allied with the former employee served on the committee. The procedures called for unanimous agreement on the replacement. Several postings were required before the position was filled by someone all parties could agree upon, but consensus was considered so important that it outweighed inconvenience caused by the delay. In the process, all partners focused their expectations, came to understand their differing perspectives, and developed a model for solving other problems. The position is now filled by someone who is carrying out activities to everyone's satisfaction, and project objectives are being met.

The lesson from this example is clear: Facing a problem is good for the partnership, even if it creates tensions. Tensions addressed directly, within the structure of the partnership, advance the problem-solving processes and provide opportunities for opposing viewpoints to be expressed and resolved. In this case, it probably would have been more efficient to ignore what seemed to be a minority viewpoint that supported the terminated employee. Inclusion, however, led to hiring an appropriate person,

albeit later than anticipated, more important for greater commitment from a once-disgruntled partner.

How Can Partnerships Survive the Loss of Funds?

Partnerships need funds to operate. The funds can be in the form of donated time or direct cash payments. The partnerships we studied all received federal funds as well as cash and/or time from partners. As the federal contribution declined, as planned, partnerships accommodated the change in both productive and nonproductive ways. Below we discuss successful ways to address the problem because even nonfederally funded partnerships are likely to experience funding problems along the way.

Loss of funds, for whatever reason, means loss of activities. Partnerships should plan activities so some can be moved from the partnership budget to the institutional budgets. Also, multiple sources of funds should be sought so the loss of one funder isn't devastating. If, despite all efforts, funds are lost, there are ways of dealing with the loss. Some of these ways are better than others.

The least productive way to deal with loss of funds was exemplified by two projects, both of which eliminated or decreased a set of activities.

In one case, university support for assistance to teachers as they changed their instructional approaches and incorporated technology was lessened. In the other, a curriculum development component was eliminated. Both decisions left school-based participants, and the partner representing them, dismayed. And, the decisions had a negative effect on implementation.

Technical assistance is important to implementation. Perhaps more important, the participating teachers had requested *more* assistance, and they received less. A sense of betrayal resulted.

The decision to drop the curriculum development component had less effect on program implementation but also was made unilaterally. The partner who was supposed to develop curriculum was not really prepared to do so. The decrease in funds provided a reason for eliminating the component, which would have required more changes within the partner organization than it was prepared to make. The school district partner read the elimination as the partnership "doing to" the schools, but not to other partners.

Other partnerships eliminated or diminished components without the backlash experienced in the two cited examples. No successful partnership, however, eliminated assistance at the activity level. With that exception, the issue was not so much that activities were eliminated or reduced, but how the decision was made. Partners shouldn't be allowed to decide unilaterally what to eliminate or decrease. Rather, the decision about how to deal with the decrease in funds is a collective one.

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One partnership, aimed at changing curriculum and instruction through the application of technology, originally planned to implement the approach by adding a grade level each year and having teachers help teachers. By the end of the first year, the teachers requested more assistance. The partnership was unable to fund more assistance, and, indeed, faced decreasing the amount of assistance that would be made available. Discussion among the partners led them to decide to slow down the development process. Each teacher could, therefore, receive more assistance as requested, but fewer teachers would be involved.

Assistance is, of course, an issue, but more important is that the decision was not unilateral and took the feelings of partners into account.

All partnerships confront problems. Particularly in the early days of partnership activity, some problems are difficult challenges. How the challenges are dealt with as the partnership begins sets the tone for future endeavors.

Two approaches to problems characterize successful partnerships. First, confront problems. Do not avoid them. Second, use the problem-solving process to create greater understanding and trust among partners. Few decisions are unilateral, and when they are, when solo action is imperative, take care to check out the decision with other partners. Identify those most likely to oppose a particular decision and include them in the process so decisions engender support from all participating organizations. Finally, pay attention to both process and content and be willing to sacrifice "efficiency" for building the partnership.

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SECTION VI

WILL THE EFFORT BE WORTHWHILE?

Successful partnerships advance educational improvement and create opportunities for participants to grow.

We have argued in this guide that partnerships are not the answer to every educational problem and concern. Even when they are appropriate, they require lots of work. At the start, the effort may seem difficult than the yield, but when developed effectively, we believe partnerships are a major force for reforming education and providing participants with opportunities for professional growth.

Partnerships, by linking schools with other organizations, give students opportunities that they otherwise would not have. For students in school-to-work transition programs, the chance to shadow a worker or have an internship can make academic subjects meaningful. To many people, math is more interesting when applied in a manufacturing problem than it is in the classroom, and the increased interest results in greater motivation and learning. When schools are linked with social service agencies in a partnership, students and their families are able to benefit greatly. And partnerships that provide resources to transform the classroom so it encourages student intellectual and social development have had profound effects on both teachers and students.

The opportunities for professional growth are great, too. We've met teachers who say, "I can never work the old way again," and business representatives who believe their participation in partnership activities made them better supervisors. One even said she'd quit her job if the opportunity to work in schools went away.

Those success stories demonstrate the potential value of partnerships. They also provide motivation to work through problems. No one can determine whether a partnership is appropriate for a given setting except those people in the setting. No one can determine whether the problems are worthwhile except the people who experience them.

We end with the following messages:

There is no single partnership structure nor are there particular goals associated with successful educational partnerships, but there are promising examples. Structure and goals must fit the context. Information must be openly shared to ensure that they do.

Every individual, organization, and partnership faces problems and makes mistakes. The way in which these problems and mistakes are dealt with is more important than what they are.

Partnerships can enhance educational opportunities for students and provide teachers and business representatives with the chance to grow. The challenges are stimulating and the outcomes rewarding.

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Appendix

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